July 2003

RE: EDconnect for Windows, version 5.3.0

CPS/WAN Technical Support is pleased to announce the availability of EDconnect for Windows, version 5.3.0.

EDconnect 5.3.0 contains the following changes and enhancements:

- The **Password Expiration Period** for **User ID** and **Network** passwords has changed to 90 days from 120 days. The software will now reflect the new expiration date. You will see a reminder to change your passwords 9 days before the password is due to expire.
- Windows 95 no longer is a supported operating system for EDconnect. Supported operating systems are Windows 98, Windows NT, Windows ME, Windows 2000, and Windows XP.

- The **Batch Number** is now displayed in the **Activity Log**, **Mailbox Query**, and **Archive View** and will display up to 50 characters.

- The **Restored Date** now appears in the **Activity Log**, **Mailbox Query**, and **Archive Views**. If you have a batch restored to the SAIG, the **Restored Date** will be the date that the file was restored. This enhancement will simplify the process of identifying restored files.

- A security banner will appear each time you open EDconnect. You must acknowledge this message by clicking OK prior to entering the software.

- A new error notification process has been added. You will see a new color-coded message in the transmission queue and there will be more detailed information available for your IT staff.

- A pop-up warning during transmission will remind you to remove existing O*N05/O*N95 headers and trailers. These headers and trailers must be removed or EDconnect cannot send the file.

- EDconnect will check the version of your message table automatically to ensure that you always have the most recent version of the table.

- New **Transmission Queue Templates** have been created to allow requests for all data from the COD, DLQRPT, and LaRS projects.

- To avoid any possible batch integrity issues, the combine feature has been disabled for all message classes for COD, Direct Loan, and Pell.

If you have not installed any EDconnect 5.x version, then you need to run a **full installation** of EDconnect 5.3.0.

If you have already installed EDconnect 5.x, you should run an **upgrade installation** of EDconnect 5.3.0.

Performing a Full Installation of EDconnect 5.3.0

These instructions are for people who are installing EDconnect for the first time in order to access a new SAIG mailbox. If you are installing EDconnect on a new network workstation, see the **Install Guide** for information about network installations.

1. Download EDconnect 5.3.0 from the FSAdownload Web site (**http://www.fsadownload.ed.gov/softedconnect.htm**) and perform a **full installation**. You can find detailed instructions for downloading and installing EDconnect 5.3.0 in the *Installation Guide for EDconnect: Student Aid Internet Gateway (SAIG)*, also available from the FSAdownload Web site.

2. Start EDconnect 5.3.0. When you log in for the first time, you will need to use the default **User ID** of "Admin" (without the quotation marks) and the password "PASSWORD" (uppercase and without the quotation marks).

3. The **Setup Wizard** will walk you through completing the **Security Group** setup. On the **SAIG Information** dialog, you must indicate your **TG Number** (including the "TG," uppercase and without the quotation marks) and enter a **Local Only** network password (the **Network and Local** password option will not be available during initial setup). Enter the word "PASSWORD" (uppercase and without the quotation marks) in both the **New** and **Verify** text boxes and click **OK**. A message box will inform you that the local TG password has been changed.

4. The **User Wizard** will help you create a **User ID**.

5. The **Connection Wizard** will help you configure EDconnect for transmitting data through your existing Internet connection. Under most circumstances, you will want to select "Direct Connection" from the **Connection to Use** drop-down list. Do not select any connections used by EDconnect 4.1.0 or earlier, such as "SAIG-0." The installation guide contains additional information about selecting a connection.

   FIREWALL ISSUES: EDconnect is an FTP ("File Transfer Protocol") program that uses an existing Internet connection on your computer to send and receive data. If you are behind a firewall, your network administrator will need to open **Port 26581** for outbound TCP/IP traffic. The IP address of the SAIG is **198.77.163.220**. If you repeatedly get "Error 1" trying to send or receive data, contact your network administrator to see if you are behind a firewall.

6. Perform a **Network and Local** password change to establish your new SAIG mailbox password. Open **Security View** by choosing **New** from the **File** menu and selecting **Security View** from the list of views. Right-click on the **Administration Group** and select **Properties** from the pop-up menu. On the **Network** tab of the **Group**

Properties dialog, select **Network and Local** as the **Change Type**. Enter a new password of seven or eight characters and verify it. Click **OK**. This will add a password change request to the **Transmission Queue**. Transmit your new network password by selecting **Now** from the **Transmission** menu.

TESTING YOUR CONNECTION: After a full initial installation, EDconnect 5.3.0 will prompt you to test your connection. An unsuccessful test does not necessarily mean there is anything wrong. If you are able to send a network password change and receive the message class table, there is no need to test your connection. You may choose to skip the test.

7. If you have never accessed your new SAIG mailbox, you should receive the latest message class table the first time you connect, such as when you transmit your network password change. The message class table will import automatically into EDconnect 5.3.0. Until EDconnect 5.3.0 imports the message class table, you will not be able to send files to or receive files from your new SAIG mailbox.

   MESSAGE CLASS TABLES: If "SAIG" is the only option under **Project** in the **Transmission Queue**, EDconnect 5.3.0 has not yet imported a message class table. You can download the most recent message class table from the SFAdownload Web site (**http://www.fsadownload.ed.gov/softedconnect.htm**) and import it by choosing **Import** from the EDconnect 5.3.0 **File** menu. Select "Message Class File" as the **File Type** and click the **Browse…** button to browse to the location where you downloaded the message class table.

8. Set your **Send** and **Receive** directories, if necessary. If you do not change the default **Send** and **Receive** paths, EDconnect 5.3.0 sends files from and receives files to C:\IAM\DATA or, in the case of NSLDS files, C:\NSLDS\FILES. To change the default paths, open **Security View** by choosing **New** from the **File** menu and selecting **Security View** from the list of views. Right-click on a **User ID** for which you want to change the paths and choose **Properties** from the pop-up menu. Click on the **Directories** tab. Change "Database" to "Receive" and click the **Browse…** button to select a **Receive** directory. Change "Receive" to "Send" and click the **Browse…** button to select a **Send** directory.

Performing an Upgrade from EDconnect 5.x to EDconnect 5.3.0

1. Download EDconnect 5.3.0 from the SFAdownload Web site (**http://www.fsadownload.ed.gov/softedconnect.htm**).

2. Perform an **upgrade installation**. If your EDconnect 5.x database is on a network drive, DO NOT run a **Network Install** upgrade to update the database. Only run a **Workstation Install upgrade.** If your EDconnect 5.x database is on your local drive, use the **Local Install upgrade** option.

3. Start EDconnect 5.3.0. A message box will inform you that "EDconnect has detected a prior version of the database" and that the database needs to be converted to the 5.3.0 format. Click **OK**.

4. Previously established **Security Groups**, **User IDs**, passwords, and settings will remain the same. You should not need to transmit a network password change or import a message class table.

If You Need Further Information…

You may reach CPS/WAN Technical Support Monday through Friday, 7:00 a.m.–7:00 p.m. (CT), at 800/330-5947. You may also e-mail inquiries, comments, or suggestions to **cpswan@ncs.com**.

CPS/WAN Technical Support